DOCUMENT RESUME

ED 097 818 HE 005 972

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TITLE Inter-State Reciprocity: Minnesota-Wisconsin Model.
INSTITUTION Minnesota Higher Education Coordinating Commission, St. Paul.
PUB DATE 14 Jul 74
NOTE 13p.; Paper presented at the Annual Meeting of the Society for College and University Planning (Denver, Colorado, July 1974)

EDRS PRICE MF-$0.75 HC-$1.50 PLUS POSTAGE
DESCRIPTORS *Higher Education; *Interstate Programs; Nonresident Students; Program Evaluation; *Residence Requirements; Resident Students; State Programs; State Universities; *Student Costs; *Tuition
IDENTIFIERS *Minnesota Wisconsin Reciprocity Agreement

ABSTRACT

This document assesses the experience of the Minnesota and Wisconsin program of student reciprocity. Under terms of the Reciprocity Agreement all residents of both states are eligible for waiver of nonresident tuition increments at any public institution in either state. Overall the Minnesota-Wisconsin reciprocity program has been effective in increasing opportunity and accessibility for a significant number of students from both states, developed initial examples of interstate program planning, and provided a continuing foundation on which substantive discussions and planning activities may be built. (MJM)

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INTER-INSTITUTIONAL PROGRAM PLANNING: MINNESOTA'S REGIONAL MODEL

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Presented at
Society for College and University Planning
Annual Meeting
July 14, 1974
Denver, Colorado

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Introduction

The theme of our conference refers to the array of changes and challenges for planners in post-secondary education. We are reminded of present and anticipated enrollment fluctuations, of current fiscal constraints, of new found accountability, and of increasing governance loops. The theme also gives special attention to increased interest in cooperative and coordinative functions within the community of planners, policy analysts and decision makers.

Within this context it appears relevant to discuss the possibilities of inter-state planning and programming, particularly when there are a number of factors which could work against maintaining inter-state activity at present levels.

Indications are that patterns of student migration are changing significantly and if trends continue by 1980 less than 15 per cent of post-secondary students will travel outside their state borders for their education.[1] There is also growing apprehension that recent changes in the age of majority statutes in most states may cause renewed judicial scrutiny of residency regulations as they apply to out-of-state tuition assessments and admissions procedures. Given these factors, and tight money, it would be relatively safe to bet that more than one state legislature will debate non-resident quotas, special admission standards, and the traditional question of why overburdened taxpayers should subsidize the education of students from other states. It seems plausible

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[1] Fenske, R.H.; Scott, C.S.; and Carmody, J.F. College Student Migration. ACT Research Report No. 54. Iowa City: American College Testing Program, December 1972; and George H. Wade. Residence and Migration of College Students: Fall 1968 Analytic Report. Washington, D.C.: U.S. G.P.O., July 1970.

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[illegible] on any or all of these variables would have the potential of further reducing student migration into their state with resultant implications for general opportunity, access, program breadth and quality, and the free flow of experience and ideas across regional boundaries.

For the purpose of initial analysis, what would your objectives be if you were a decision maker in the mythical state of Mahnomen faced with projected declines in post-secondary enrollments, increased budgetary constraints, increased accountability for opportunity and access? Would it not be reasonable to hypothesize on the basis of these factors that you might espouse the following policy objectives:

1. To increase in-migration of students to public institutions where spaces are available.
2. To service high cost and low demand educational needs on an inter-state regional basis.
3. To enhance educational opportunities and realistic access for state residents without incurring additional capital expenditures or fixed costs.

If these policy objectives are judged reasonable, it would appear to be difficult to endorse raising non-resident tuition, erecting or maintaining other barriers to in-migration, and developing expensive facilities or programs for services which might be available in a neighboring state.

With this as background, let us assess the experience of Minnesota and Wisconsin in a program of student reciprocity bearing in mind the previous policy objectives.

In viewing the Minnesota-Wisconsin model it is imperative to keep in mind that the current status is the result of six years of annual modifications and growth. Significantly, the original purposes remain:

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1. To improve the post-secondary education advantages of residents of Minnesota and Wisconsin through greater availability and accessibility of post-secondary education opportunities.
2. To achieve improved effectiveness and economy in meeting the post-secondary education needs of Minnesota and Wisconsin residents through cooperative planning.

Where are We?

Under the current terms of the Reciprocity Agreement all residents of both states are eligible for waiver of non-resident tuition increments at any public institution in either state. All programs in public institutions in both states are accessible on a space available basis to any prospective student accepted for admission under normal procedures. The agreement covers part-time as well as full-time students, graduate as well as undergraduate, and professional as well as technical students.

The eligibility determination process and financial accounting of the program are managed by the designated agencies of both states. The basic financial element is an annual accounting of the loss of non-resident tuition income per student per term resulting in an annual balancing of payments between the states.

Estimates of the 73-74 year are as follows:

A SUMMARY OF 1973-1974

	Minnesota	Wisconsin
Estimated Student Participants	1,800	900
Estimated Loss of Income	$ 500,000	$1,800,000
Anticipated Payment	$1,300,000	-

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How Did We Get Here?

A glance at the population concentrations of both states and the placement of post-secondary institutions within each provides an introduction to the development of interest in a reciprocal agreement.

It is apparent that a majority of Minnesota's population is located within a 50 mile radius of the common border with Wisconsin and that there are a number of Wisconsin communities with significant population located within a similar radius though not nearly in the proportion of Minnesota's. This general area is serviced by over 20 public post-secondary institutions and nearly an equal number of private institutions -- not counting the private trade schools. A major resource of the region, particularly for graduate and specialized programming, is the Twin Cities campus of the University of Minnesota.

The early inter-state discussions focused on the desirability of removing barriers of access to boundary institutions for students (undergraduate) residing within close proximity of the mutual border. The initial phase of reciprocity resulted in a one-to-one balanced exchange of eligible residents at boundary institutions. The total for each state in phase one was approximately 300.

With favorable student and institutional response and some agitation for an expansion of the program, phase two was not a surprise development. The boundary areas incorporated in the agreement were widened, and the total number of undergraduates in the exchange was increased slightly to approximately 325.

Following the experience of the first two phases, a number of residents, agency staffs, and institutional leaders questioned the equity of an arrangement which provided substantial benefits to a very limited sub-group of the total student population annually migrating across the inter-state border, resulting in geographical discrimination.

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The third phase opened the program to all public institutions in both states retaining the limitations of full-time undergraduates on a one-to-one exchange. As a result of this modification, the number of eligible students under the exchange increased to 625 in 1971-73. It is important to bear in mind that at this time there were approximately 1,200 Minnesota residents enrolled in Wisconsin public institutions.

Phase four under which we are currently operating is proportionately a major breakthrough, the result of the convergence of economic, political, and educational interests highlighted by the foresight and leadership of Governors Lucey of Wisconsin and Anderson of Minnesota. The result is to extend the opportunities of the agreement to all residents migrating to public institutions in the neighboring state for any program with an annual accounting at the state level.

Why Have These Developments Occurred?

Although cause and effect relationships are generally difficult to prove, there do appear to be some tentative conclusions which are warranted with regard to the development of the Minnesota-Wisconsin reciprocity model.

First, both states have a history of leadership in effective government, progressive social policy, and support for higher education with a readiness to participate in legitimate experimentation. One might hypothesize that the reciprocity agreement is consistent with this tradition.

Secondly, the peoples of the states have had a close relationship dating to the settlement of the region and a portion of this relationship has been perpetuated by the temporary migration of workers as well as students.

Thirdly, the higher education leaders of both states have espoused the maintenance of broad and diverse opportunities for potential students

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in post-secondary education as [illegible] economic, educational and social policy. The reciprocal agreement may be viewed as a natural outgrowth of these positions.

In addition, some institutional and state agency leadership have advocated the desirability of regional inter-state service by selected programs with state investments and institutional plans drawn accordingly. The reciprocal agreement serves as one foundation for such developments, and the section relating to the University of Minnesota Veterinary College is one current example.

What is the Record?

In the aggregate what has occurred since the initiation of the program in the fall of 1969? The following table shows the number of participating students under the agreement each year. It is important to note that until the 72-73 year Minnesota was exporting approximately twice as many students to Wisconsin as were being declared eligible for reciprocity status. We may also note that until 73-74 those Minnesota students not in the reciprocity program were forced to bear the full cost of differences for out-state students. With the changes in the agreement of 73-74, the state assumes these differential costs.

Other observations which may be derived from this summary are:

1. The program has experienced constant expansion in terms of area served, level of student, number of students, and number of institutions.
2. The in-migration of neighboring students has increased steadily.
3. The proportion of the migration between the states has remained stable throughout the program experience at a rate of two to one toward Wisconsin.

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4. The modifications of the agreement have not appeared to result in exaggerated changes in the number of migrations or the proportion.

5. Many students have had the opportunity to select among the best and in some cases most specialized post-secondary programs either state offers within public institutions.

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MINNESOTA-WISCONSIN RECIPROCITY 1969 - 1974

	69 - 70	70 - 71	71 - 72	72 - 73	73 - 74
Number of Students	300 (M) 132 (W)	300 (M) 174 (W)	232 (M) 232 (W)	607 (M) 607 (W)	1,800 (M) 800 (W)
Number of Institutions	9	10	10	34	38
Portion of State Included	35 mile radius	commuting radius	commuting radius	statewide	statewide
Level of Student Eligible	undergraduate	undergraduate	undergraduate	undergraduate	all post-secondary
Method of Accounting	1-1 balance	1-1 balance	1-1 balance	1-1 balance	balance of payments
Cost Implications for:					
Minnesota	balance	balance	balance	balance	-$1,300,000
Wisconsin	balance	balance	balance	balance	+$1,300,000

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What are the Planning Implications?

If there is interest in exploring the feasibility of applying this model in other localities, our experience suggests that there are a number of planning variables which should be assessed:

Institutional Impact

An open reciprocity system does not affect institutions uniformly in terms of enrollment (loss or gain), program planning, or use of services.

Our experience suggests that institutional and statewide leaders must support the desirability of enhanced student opportunity and be prepared for differential institutional impact. Prior consultation is an essential ingredient as is the sharing of planning data.

Program Planning

Within a few months of implementation of an open reciprocity system a number of programmatic effects are likely to begin to appear. For example, a program or major with a reputation for excellence and good placement may experience a quantum jump in applicants, likewise a notoriously easy program may undergo similar pressure. These effects require sharing of data, candid discussions, and a willingness to experiment as some neighboring campuses have learned to do.

The most exciting program planning prospects arise from the opportunity for two or more states to pool resources for the purpose of supporting high cost programs for which the actual costs may be high, the demand low, or the limited ability of one state to develop. We have accomplished this best in veterinary medicine; however, the New England Board, SREB and WICHE all have had experience in this activity using varying mechanisms in specific program areas. Among those affected we could undoubtedly locate both the sad and glad as inter-state program planning is a changing, insecure process with potentially significant implications for students, faculty, taxpayers, legislators, institutions, and vested interests.

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Fiscal Accounting

Once the relative security of a one-to-one balance in reciprocity is left behind, accounting for the boundary migrations becomes a potential hurdle both practical and theoretical. There continues on the one hand the need to account for bodies while on the other the need to accommodate for differences in tuition by level, program, institution, and student status. Computerized records are obviously a great help in this process.

Our transition has been eased and strengthened by the accompaniment of an income tax reciprocity agreement which provides an additional factor for maintaining a reasonable balance of payments. Support for the underlying philosophy of the program from governors, legislative leadership, and educational leaders in both states has minimized theoretical and potential backlash.

Coordination

Whatever the number of students and institutions involved in the program, a carefully devised and well coordinated program for certification and accounting is essential for program success. A program with this visibility must be well managed, properly supported, and openly ratified by participating parties.

Through painful experience we have learned that coordination of the content and release of program announcements is an essential ingredient of program effectiveness. If prospective students and institutional advisors are not operating from consistent information, the burden of telephone and mail inquiries is difficult to manage and out of proportion for the size of the program.

Another item requiring coordinated clarification is the residency guideline used to determine eligibility for the program. This may be particularly difficult in states with multiple public governing boards with the authority to establish residency requirements. If the reciprocity

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program definition varies from one or more of the participating institutions, the program definition must be clearly enunciated and of course equitably applied.

Some Conclusions

The foregoing discussion of inter-state reciprocity could lead some to conclude that the establishment and maintenance of such programs is a rather simple process. To leave that impression would be at least a partial delusion.

From the Minnesota-Wisconsin experience it is possible to conclude that whatever procedural problems exist in reciprocity may be overcome through candid negotiations and a sharing of essential information. The most difficult hurdles are those of a conceptual and financial nature. If a state can not subscribe to the desirability of enhancing opportunity and diversity for its residents while providing a foundation for substantive inter-state planning, then participation in a reciprocal arrangement is likely to be relatively one-sided or shallow or both.

It would be equally misleading to court the assumption that Minnesota and Wisconsin have not had problems in the development of this model. Our problems have ranged from simple managerial ineptitude to philosophical differences pertaining to the fund accounting mechanism and to who should be the essential players in inter-state program planning. The experience has, nevertheless, been relatively successful due to a prevailing spirit of the need to cooperate, legislative and executive support, and the growing impact on the educational careers of many students.

Overall, the Minnesota-Wisconsin reciprocity program has been effective in increasing opportunity and accessibility for a significant number of students from both states, developed initial examples of inter-state program planning, and provided a continuing foundation on which

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[illegible] obviously [illegible] to fully [illegible] relationships of the [illegible] most unique in establishing a [illegible]. The continuing legislative and executive support in both states must be considered as a major factor in the maintenance of a spirit of [illegible] inability of inter-state planning and assistance.

The historical development of the Minnesota-Wisconsin Boundary Program may provide a useful documented model for other states. Because conditions and circumstances vary, however, it should be viewed not as a prescription but as a guide and not as a panacea but as a useful framework for accomplishing specific objectives.